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P-CARD USER MANUAL

ATTACHING SCANNED DOCUMENTS

INTRODUCTION

You can scan receipts, invoices, etc., and attach them to the transactions or transmittal. The scanned documents will then be in the application for approvers, auditors, or managers to view online.

Documents must be scanned at your agency or agency field location and saved on a local or network hard drive. You can then browse for and upload the scanned files into the application.

TO ATTACH A DOCUMENT

1. Open the **Attachments** section according to whether you are a Verifier or an Approver:
 - **Verifier:** Click **Create Trans & Atch**. The **Attachments** section will be displayed below the transactions.

CAUTION: This creates a transmittal (“**Create Trans**”) in order to attach (“**Atch**”) documents to it. If you click this, you must attach a file.

Figure 1 – Verifier: Create Trans & Atch

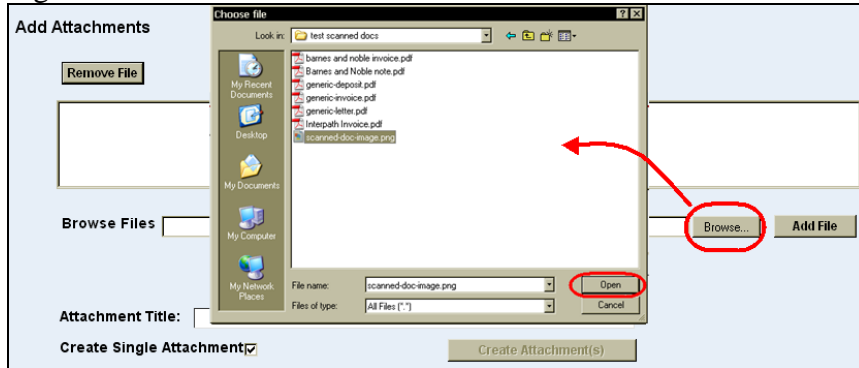
The screenshot shows the P-Card application interface. At the top, there are navigation tabs: Reports, App Menu, Statewide Acct, and Logoff. A Back button is also present. Below the tabs, there are dropdown menus for Card Holder (MASIKO MONICA B) and Credit Cards (MASIKO MONICA B : 242206). A table displays transaction data with columns: Split, Ve, Pe, TranDate, Amount, Vendor, VendorID, Sfx, PCA, INDEX, BFY, Sub, Dtl, 1099, STARS, Vend, Sfx, CI, and Gran. The table has two rows of data. At the bottom, there are buttons for Undo Changes, Save Changes, Create Trans & Atch (highlighted with a red circle), and Submit & Print.

Split	Ve	Pe	TranDate	Amount	Vendor	VendorID	Sfx	PCA	INDEX	BFY	Sub	Dtl	1099	STARS	Vend	Sfx	CI	Gran
			3/9/2007	20.00	USPS 5480520467 SALMON ID	135641517		09000		2007	5020							
			3/14/2007	26.04	KINGS OF SALMON SALMON ID	820136477		09000		2007	5410							

- **Approver:** Select a transmittal from the **Select Transmittal** menu or enter a transmittal number in the **Enter Transmittal** field and press ENTER. The **Attachments** section will be displayed below the transactions.

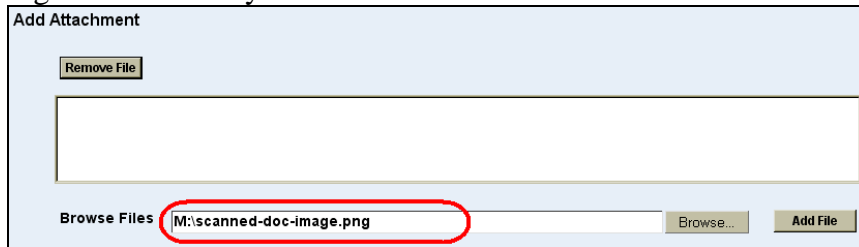
2. Click **Browse** to locate your scanned document file. Valid types include files with the following extensions: .pdf,.jpg,.gif,.bmp,.png,.tif,.tiff. (The file extension .jpeg will not work.)

Figure 2 - Browse for scanned document



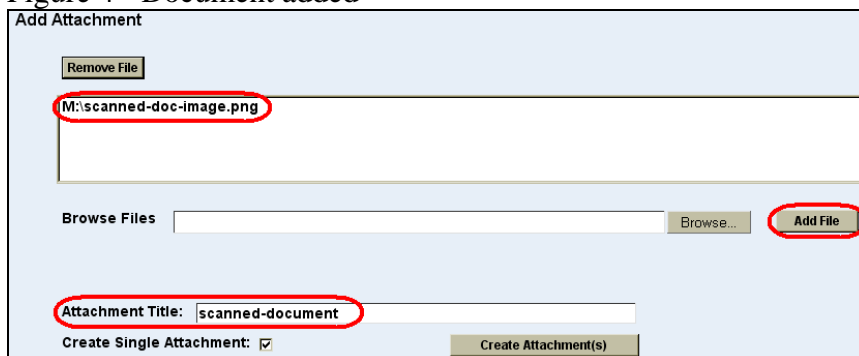
3. Highlight the scanned document file and click **Open**. The directory location of the document will appear in the **Browse Files** field.

Figure 3 –Directory location



4. Click **Add File**. The document will be added to a queue. The filename (without the extension) of the scanned document will be automatically entered in the **Attachment Title** field.

Figure 4 - Document added



5. If desired, change the **Attachment Title** to something more suitable for the document. Otherwise, leave the default title based on the file name.
6. For only one document, leave **Create Single Attachment** checked. If you have changed the **Attachment Title**, this will apply the change. For more than one file, see [Attaching Multiple Documents](#) section below.
7. Click **Create Attachment(s)**. The document will appear in the **Attachments** area. (Click **View** if you want to view the attachment.)
8. As a Verifier, click **Submit & Print**. As an Approver, click **Reprint Transmittal**.

Figure 5 - Attached document with View

Attachment Title	Date	Size	Action
scanned-document	4/7/2008 8:40:44 AM	16K	View

Add Attachment

[Remove File](#)

TO ATTACH MULTIPLE DOCUMENTS

You can create attachments from multiple scanned documents either one at a time or all at once. If you create the attachments at one time, you will not be able to enter unique **Attachment Titles** for each one. In order to add multiple documents and give them unique Document Titles, add and create the attachments one at a time.

1. Repeat the steps above to add a second document to the queue. Note the **Attachment Title** field remains the same from the first document added. In the example below, the file “generic-letter.pdf” was added, but the name from the first file, “generic-invoice” is still in the **Attachment Title** text box.
2. Continue adding as many documents as needed.

Figure 6 - Adding multiple documents

Add Attachments

[Remove File](#)

M:\Payment Services\test docs\generic-invoice.pdf
M:\Payment Services\test docs\generic-letter.pdf

Browse Files: [Browse...](#) [Add File](#)

Attachment Title:

☒ Create Single Attachment [Create Attachment\(s\)](#)

3. Leave **Create Single Attachment** checked or click the check box to clear it. Your choice will affect the **Attachment Title** of the attached documents:
 - a. Leave the checkbox checked, click **Create Attachment(s)**, and all of the documents will have the *same* **Attachment Title** based on the filename of the first document added.

Figure 7 - Same document title

The screenshot shows the 'Attachments' section of a web application. At the top is a table with columns 'Attachments Title', 'Size', and 'Action'. It contains two rows, both with the title 'generic-invoice' and size '7K'. Below the table is the 'Add Attachments' section, which includes a 'Remove File' button, a large text input field, a 'Browse Files' button, and an 'Attachment Title' input field. At the bottom, there is a 'Create Single Attachment?' checkbox (which is checked) and a 'Create Attachment(s)' button. Red dashed lines and boxes highlight the first row of the table and the 'Create Single Attachment?' checkbox.

- b. Clear the **Create Single Attachment** check box, click **Create Attachment(s)**, and the documents will have *different* **Attachment Titles** based on their filenames.

Figure 8 - Different document titles

The screenshot shows the 'Attached Documents' section of a web application. At the top is a table with columns 'Attachments Title', 'Size', and 'Action'. It contains two rows: the first with title 'generic-invoice' and size '22K', and the second with title 'generic-letter' and size '7K'. Below the table is the 'Add Attachments' section, which includes a 'Remove File' button, a large text input field, a 'Browse Files' button, and an 'Attachment Title' input field. At the bottom, there is a 'Create Single Attachment?' checkbox (which is unchecked) and a 'Create Attachment(s)' button. Red dashed lines and boxes highlight the first row of the table and the 'Create Single Attachment?' checkbox.

SCANNER SETTINGS

Several factors must be considered when scanning documents for your agency, – e.g., the type of scanner or multi-function machine you use and its settings, hard disk storage capacity at your agency, and the type of originals (size and color of paper, size and color of print, etc.). Each agency will need to develop their own best practices appropriate for their environment. Two settings often found on scanners and multi-function machines are:

Resolution: Generally scanners will offer a scanning resolution setting expressed in “dpi” or dots per inch. The lower the setting the smaller the file size, but the worse quality of image produced. With most documents, a setting of 150dpi seems to work well.

File formats: Your particular scanner or and multi-function machines may be capable of producing a variety of file formats (e.g., .pdf,.jpg,.gif,.bmp,.png,.tif,.tiff). For many agencies, .jpg and .pdf work well.

You should test your own equipment to see which resolution and file format settings create the smallest file size with acceptable visual quality.

DOCUMENT RETENTION

Your agency may need to develop document retention rules to determine if copies will be kept by your agency as well and for how long. Refer to the [Department of Administration’s Web site](#) for record retention information.